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## COVER SHEET FOR AMENDMENT OF POST-TRAVEL SUBMISSION

**Instructions:** Use this form as a cover sheet for any paperwork you may need to submit to the Office of Public Records in order to make your Privately Sponsored Post-Travel Submission complete in accordance with Rule 35. **Only complete this form if you need to submit an amendment to a post-travel filing you have already submitted.**

SUBMIT DIRECTLY TO THE OFFICE OF PUBLIC RECORDS IN 232 HART BUILDING

Name of Traveler: Adam Telle

Employing Office/Committee: Senator Bill Hagerty

Travel Expenses Paid by (List all sources): Pew Charitable Trusts

Travel Date(s): Sept 10-12, 2021

Description/Title of Attached Forms: Pre Travel Authorization, Description

Purpose of Amendment (describe the reason for amending original submission): Missing Pre Travel Authorization

Updated forms from Pew outlining purpose of the trip

1/18/22  
(Date)

[Signature]  
(Signature of Traveler)

Addendum to Private Sponsor Travel Certification Form, The Pew Charitable Trusts Bipartisan Senate  
Chiefs of Staff Conference, September 10-12, 2021

New York, NY

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14. The Pew Charitable Trusts has directly sponsored congressional travel. This will be the eighth Senate Chiefs of Staff conference hosted by Pew (2007, 2009, 2011, 2014, 2015, 2017, 2019). In the past, The Pew Charitable Trusts has also funded other institutions via grants to conduct their educational programs and some of these programs may have included congressional travel.

15. The Pew Charitable Trusts is driven by the power of knowledge to solve today's most challenging problems. Pew applies a rigorous, analytical approach to improve public policy, inform the public and invigorate civic life. We partner with a diverse range of donors, public and private organizations and concerned citizens who share our commitment to fact-based solutions and goal-driven investments to improve society. Pew issues dozens of research reports each year to educate the public and policy makers. Pew also sponsors convenings of researchers and experts to examine various issues of public policy and civic life.



Date/Time Stamp:

**EMPLOYEE PRE-TRAVEL AUTHORIZATION**

**Pre-Travel Filing Instructions:** Complete and submit this form at least 30 days prior to the travel departure date to the **Select Committee on Ethics in SH-220**. Incomplete and late travel submissions will **not** be considered or approved. This form **must** be typed and is available as a fillable PDF on the Committee's website at [ethics.senate.gov](http://ethics.senate.gov). Retain a copy of your entire pre-travel submission for your required post-travel disclosure.

Name of Traveler: Adam TelleEmploying Office/Committee: HagertyPrivate Sponsor(s) (list all): The Pew Charitable TrustsTravel date(s): September 10 - 12, 201

*Note: If you plan to extend the trip for any reason you **must** notify the Committee.*

Destination(s): New York City

Explain how this trip is specifically connected to the traveler's official or representational duties:

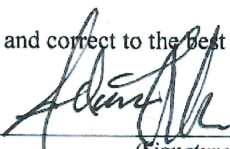
Attend with bipartisan group of Senate chiefs of staff to develop management and leadership skills.

Name of accompanying family member (if any): \_\_\_\_\_

Relationship to Employee: ☐ Spouse ☐ Child

I certify that the information contained in this form is true, complete and correct to the best of my knowledge:

9/2/2021  
(Date)

  
(Signature of Employee)


TO BE COMPLETED BY SUPERVISING SENATOR/OFFICER (President of the Senate, Secretary of the Senate, Sergeant at Arms, Secretary for the Majority, Secretary for the Minority, and Chaplain):

I, Bill Hagerty hereby authorize Adam Telle  
(Print Senator's/Officer's Name) (Print Traveler's Name)

an employee under my direct supervision, to accept payment or reimbursement for necessary transportation, lodging, and related expenses for travel to the event described above. I have determined that this travel is in connection with his or her duties as a Senate employee or an officeholder, and will not create the appearance that he or she is using public office for private gain.

I have also determined that the attendance of the employee's spouse or child is appropriate to assist in the representation of the Senate. (signify "yes" by checking box) ☐

9/2/21  
(Date)

  
(Signature of Supervising Senator/Officer)

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## PRIVATE SPONSOR TRAVEL CERTIFICATION FORM

This form must be completed by any private entity offering to provide travel or reimbursement for travel to Senate Members, officers, or employees (Senate Rule 35, clause 2). Each sponsor of a fact-finding trip must sign the completed form. The trip sponsor(s) must provide a copy of the completed form to each invited Senate traveler, who will then forward it to the Ethics Committee with any other required materials. The trip sponsor(s) should **NOT** submit the form directly to the Ethics Committee. Please consult the accompanying instructions for more detailed definitions and other key information.

The Senate Member, officer, or employee **MUST** also provide a copy of this form, along with the appropriate travel authorization and reimbursement form, to the Office of Public Records (OPR), Room 232 of the Hart Building, within thirty (30) days after the travel is completed.

1. Sponsors(s) of the trip (please list all sponsors): The Pew Charitable Trusts
2. Description of the trip: Bipartisan Senate Chiefs of Staff Conference
3. Dates of travel: 9/10/2021 - 9/12/2021
4. Place of travel: New York, NY
5. Name and title of Senate invitees: Chiefs of Staff (see attached list)
6. I certify that the trip fits one of the following categories:
  - ☐ (A) The sponsor(s) are not registered lobbyists or agents of a foreign principal **and** do not retain or employ registered lobbyists or agents of a foreign principal **and** no lobbyist or agents of a foreign principal will accompany the Member, officer, or employee *at any point* throughout the trip.
  - OR -
  - ☒ (B) The sponsor or sponsors are not registered lobbyists or agents of a foreign principal, but retain or employ one or more registered lobbyists or agents of a foreign principal and the trip meets the requirements of Senate Rule 35.2(a)(2)(A)(i) or (ii) (see question 9).
7. ☒ I certify that the trip will not be financed in any part by a registered lobbyist or agent of a foreign principal.
  - AND -
  - ☒ I certify that the sponsor or sponsors will not accept funds or in-kind contributions earmarked directly or indirectly for the purpose of financing this specific trip from a registered lobbyist or agent of a foreign principal or from a private entity that retains or employs one or more registered lobbyists or agents of a foreign principal.
8. I certify that:
  - ☒ The trip will not in any part be planned, organized, requested, or arranged by a registered lobbyist or agent of a foreign principal except for *de minimis* lobbyist involvement.
  - AND -
  - ☒ The traveler will not be accompanied on the trip by a registered lobbyist or agent of a foreign principal except as provided for by Committee regulations relating to lobbyist accompaniment (see question 9).

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**9. USE ONLY IF YOU CHECKED QUESTION 6(B)**

*Certify* that if the sponsor or sponsors retain or employ one or more registered lobbyists or agents of a foreign principal, one of the following scenarios applies:

- ☐ (A) The trip is for attendance or participation in a one-day event (exclusive of travel time and **one** overnight stay) and no registered lobbyists or agents of a foreign principal will accompany the Member, officer, or employee *on any segment* of the trip.
- OR -
- ☐ (B) The trip is for attendance or participation in a one-day event (exclusive of travel time and **two** overnight stays) and no registered lobbyists or agents of a foreign principal will accompany the Member, officer, or employee *on any segment* of the trip (*see questions 6 and 10*).
- OR -
- ☒ (C) The trip is being sponsored only by an organization or organizations designated under § 501(c)(3) of the Internal Revenue Code of 1986 and no registered lobbyists or agents of a foreign principal will accompany the Member, officer, or employee *at any point* throughout the trip.

**10. USE ONLY IF YOU CHECKED QUESTION 9(B)**

If the trip includes two overnight stays, please explain why the second night is practically required for Senate invitees to participate in the travel:

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11. ☒ An itinerary for the trip is attached to this form. *Certify* that the attached itinerary is a detailed (hour-by-hour), complete, and final itinerary for the trip.

12. Briefly describe the role of each sponsor in organizing and conducting the trip:

The Pew Charitable Trusts is the sole organizer and sponsor of this trip.

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13. Briefly describe the stated mission of each sponsor and how the purpose of the trip relates to that mission:

See attachment

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14. Briefly describe each sponsor's prior history of sponsoring congressional trips:

See attachment

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15. Briefly describe the educational activities performed by each sponsor (other than sponsoring congressional trips):
- see attachment

16. Total Expenses for Each Participant:

	Transportation Expenses	Lodging Expenses	Meal Expenses	Other Expenses
<input checked="" type="checkbox"/> Good Faith estimate	\$230.4/ Amtrak roundtrip \$250.00 - coach bus in NYC \$120 - ferry to and from Ellis Island	\$286/night \$572 total	\$228 (\$76/day)	
<input type="checkbox"/> Actual Amounts				

17. State whether a) the trip involves an event that is arranged or organized *without regard* to congressional participation or b) the trip involves an event that is arranged or organized *specifically with regard* to congressional participation:

This trip has been arranged specifically with regard to congressional participation

18. Reason for selecting the location of the event or trip:

New York was selected, as the weekend coincides with the 20th anniversary of the 9/11 terrorist attacks.

19. Name and location of hotel or other lodging facility:

New York Marriott Downtown

20. Reason(s) for selecting hotel or other lodging facility:

New York Marriott Downtown can provide the necessary meeting space for the planned seminars, is located in proximity to 9/11 Memorial & Museum and can provide the required number of guest rooms to accommodate the group.



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21. Describe how the daily expenses for lodging, meals, and other expenses provided to trip participants compares to the maximum per diem rates for official Federal Government travel.

Lodging and meals are at the federal per diem rate for New York, NY.

22. Describe the type and class of transportation being provided. Indicate whether coach, business-class or first class transportation will be provided. If first-class fare is being provided, please explain why first-class travel is necessary:

Transportation to New York will be provided via coach Amtrak train. Transportation in NYC will be provided via coach buses and a ferry.

23. ☒ I represent that the travel expenses that will be paid for or reimbursed to Senate invitees do not include expenditures for recreational activities, alcohol, or entertainment (other than entertainment provided to all attendees as an integral part of the event, as permissible under Senate Rule 35).

24. List any entertainment that will be provided to, paid for, or reimbursed to Senate invitees and explain why the entertainment is an integral part of the event:

n/a

25. I hereby certify that the information contained herein is true, complete and correct. (For trips involving more than one sponsor, you must include a completed signature page for each additional sponsor):

Signature of Travel Sponsor: Tamera Luzzatto

Name and Title: Tamera Luzzatto, Senior Vice President, Government Relations

Name of Organization: The Pew Charitable Trusts

Address: 901 E Street, NW, Washington, DC, 20004

Telephone Number: 202.540.6501

Fax Number: \_\_\_\_\_

E-mail Address: tluzzatto@pewtrusts.org



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**PRIVATE SPONSOR TRAVEL CERTIFICATION FORM**  
**SIGNATURE PAGE FOR ADDITIONAL SPONSOR**  
*(to be completed by each additional sponsor)*

I hereby certify that the information contained on pages 1-4 of the certification form and any accompanying addenda, all submitted in connection with the September 10-12, 2021 trip  
to New York, NY is true, complete, and correct.  
Place of Travel

DocuSigned by  
Signature of Travel Sponsor: Tamera Luzzatto

Name and Title: Tamera Luzzatto, Senior Vice President, Government Relations

Name of Organization: The Pew Charitable Trusts

Address: 901 E NW Washington DC 20004

Telephone Number: 202.540.6501

Fax Number: \_\_\_\_\_

E-mail Address: tluzzatto@pewtrusts.org

Addendum to Private Sponsor Travel Certification Form, The Pew Charitable Trusts Management and  
Leadership Conference, September 10-12, 2021

New York, NY

1-10. See form

11. See attachment

12. See form

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16-25. See form.

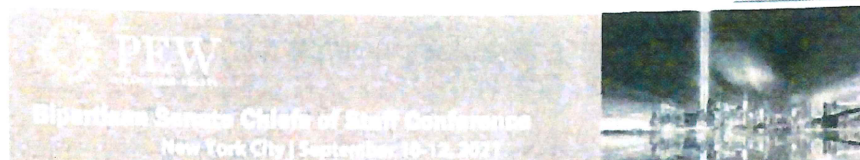


- 10:15am Check in at Union Station, Starlight Lounge behind Gate D
- 11:05am Depart for NYC via Amtrak 84  
Box lunch and beverages provided on board
- 2:33pm Arrive New York City, Penn Station Moynihan Hall
- 3:15pm Check in to Marriott Downtown  
85 West Street at Albany Street
- 6:00pm Meet in hotel lobby for transportation to Gracie Mansion
- 6:30-8:30pm **Reception at Gracie Mansion hosted by Mayor Bill de Blasio and First Lady Chirlane McCray**  
Mayor de Blasio and First Lady Chirlane McCray will share reflections on the 9/11 attacks and the nation's largest city's approach to recovery from the effects of the COVID-19 pandemic on the city's economy and its citizens' health
- 7:00-9:30am Breakfast at your leisure  
Marriott Hotel
- 8:30-9:45am Reading of the names of the 9/11 victims  
- broadcast in the breakfast room
- 10:00-11:30am **Panel discussion on federal recovery support after 9/11**  
As discussion of legislation for COVID recovery continues, panelists who were involved in the federal government's response to 9/11 will discuss their experiences. Tamara Luzzatto (The Pew Charitable Trusts), Polly Trottenberg (United States Deputy Secretary of Transportation), Jim Mazzaella (former Governor Pataki staff), and Glen Caplin (Senator Gillibrand's office).
- 11:30am-12:00pm Break
- 12:00-1:30pm **Lunch with speaker from the Pew Research Center**  
Topic related to Senate duties, general politics data related to 9/11  
IBD

1:30-3:00pm	<b>Speaker/Panel TBD – Voices of 9/11</b> Family members of victims of the 9/11 attack reflect on their experience and the federal government response.
3:00-5:30pm	Break
5:30pm	Meet in Marriott Lobby for walk to ferry to Ellis Island
6:30-7:30pm	Reception on Ellis Island
7:30-9:00	<b>Dinner and Keynote address from Admiral William McRaven</b> Admiral McRaven was the chief of the U.S. Special Operations Command (USSOCOM) which had responsibility for synchronizing Department of Defense plans against global terrorist networks and, as directed, conducting global operations. Under his watch, U.S. Special Operations Forces delivered what will be perhaps viewed as the crowning victory in America's war against terror: The May 2011 raid that killed al-Qaeda leader Osama bin Laden. After retiring from military service, he went on to serve as chancellor of the University of Texas and is recognized for his inspirational speeches and writing on leadership.
7:00-8:00am	Breakfast at your leisure, Marriott Hotel
8:00-9:00am	Visit to the 9/11 Tribute Museum
9:30am	Meet in lobby for checking out and transportation to the IAC Building, 555 West 18 <sup>th</sup> Street.
10:00am-11:00am	<b>Session with New York City business leaders</b> A panel of four small business owners led by Asahi Pompey, Global Head of Corporate Engagement, Goldman Sachs.
11:00am-12:00pm	<b>Panel discussion of the overall economic impact of the pandemic and federal interventions to support recovery</b> including Darren Walker, President of Ford Foundation; Jon Gray, President of Blackstone; and Anand Selva, CIO of Citi's Global Consumer Bank, and Joey Levin, CIO of IAC. Moderated by Kathryn Wyld, President of the non-profit Partnership for New York City.
12:00pm-12:30pm	Presentation by Barry Diller, Chairman of IAC, and Diane von Furstenberg
12:30pm-2:00pm	Walk to Little Island Picnic lunch.
2:15pm-2:45pm	Transportation to Penn Station
4:05pm	Depart Penn Station Moynihan Hall for Washington via Amtrak 189 Snacks and beverages provided on board
7:35pm	Arrive Union Station Washington, DC

7/27/2021

The Pew Charitable Trusts

[View in web browser](#)

## **Bipartisan Senate Chiefs of Staff Conference**

### **The Pew Charitable Trusts**

**Invites You and Your Spouse/Significant  
Other  
To the 8th Biennial**

### **Senate Chiefs of Staff Management and Leadership Conference**

New York City

September 10-12, 2021

The Pew Charitable Trusts will host a conference for the Senate Chiefs of Staff from September 10-12, 2021, in New York City. It promises to be an engaging and informative weekend where you can learn from some of the most interesting speakers on management, leadership and civility today. A copy of the agenda is available [here](#).

We will depart from Union Station on Friday, September 10 on a private rail car and return on Sunday, September 12. Chiefs' expenses (minus alcohol and entertainment) are covered by The Pew Charitable Trusts. If you wish to invite your spouse, you may reimburse Pew for those expenses (estimated to be at least \$800 due to cost of needed travel during this weekend in NYC) after the



7/27/2021

The Pew Charitable Trusts

conference.

Your pre-travel paperwork should be received by the Select Committee on Ethics, 220 Hart, by Monday, August 9, 2021 to ensure processing by the legal deadline. The Committee is very strict about their deadlines and will bar attendance by staff who submit late. For that reason, *we recommend you complete and submit immediately even if you're not sure you'll attend* as there is no penalty if you're approved but later decide you can't attend (other than we need to know as soon as possible if you change your mind). Click here to download the paperwork.

[CLICK HERE TO REGISTER \(USE COV EMAIL\)](#)

If you are **unable** to attend, please [click here](#)

We look forward to seeing you in New York City this fall!

Tamera Luzzatto  
Senior Vice President, Government Relations  
The Pew Charitable Trusts  
[tluzzatto@pewtrusts.org](mailto:tluzzatto@pewtrusts.org)  
(202) 540-6501

The Pew Charitable Trusts makes every effort to comply with federal, state, and local government ethics rules, including when hosting events. Please make sure that your participation is consistent with applicable ethics rules.

This email was sent to [jschuders@pewtrusts.org](mailto:jschuders@pewtrusts.org)

901 E Street NW, Washington, DC 20004-2006

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## Senate Chiefs of Staff

July 2021

Invitee List					
Senator	State	First	Last		
Grassley	IA	Aaron	Cummings		
Hirono	HI	Alan	Yamamoto		
Murphy	CT	Allison	Hierwitz		
Lee	UT	Allyson	Bell		
Cornyn	TX	Beth	Infante		
Marshall	KS	Brent	Robertson		
Peters	MI	Caitlyn	Stephenson		
Lujan	NM	Carlos	Sanchez		
Shaheen	NH	Chad	Kreikemeier		
Cardin	MD	Chris	Lynch		
Hirono	HI	Cobi	Hata		
Scott, Rick	FL	Craig	Carbone		
Toomey	PA	Dan	Brandt		
Barrasso	WY	Dan	Kunsman		
Rosen	NV	Dara	Cohen		
Feinstein	CA	David	Grannis		
Padilla	CA	David	Montes		
Kennedy	LA	David	Stokes		
Cotton	AR	Doug	Coutts		
Hyde-Smith	MS	Doug	Davis		
Tester	MT	Dylan	Laslovich		
Warner	VA	Elizabeth	Falcone		
Fischer	NE	Emily	Leviner		
Carper	DE	Emily	Spain		
Schatz	HI	Eric	Einhorn		
Schumer	NY	Erin	Vaughn		
Cassidy	LA	James	Quinn		
Moran	KS	James	Kelly		
Cantwell	WA	Jamie	Burgess		
Daines	MT	Jason	Thielman		
Menendez	NJ	Jason	Tuber		
Smith	MN	Jeff	Lomonaco		
Wyden	OR	Jeff	Michels		
Kelly	AZ	Jen	Cox		
Scott, Tim	SC	Jennifer	DeCasper		
Gillibrand	NY	Jess	Fassler		
Bennet	CO	Jess	Smith		
Capito	WV	Joel	Brubaker		
Blumenthal	CT	Joel	Kelsey		
Young	IN	John	Connell		
Hagerty	TN	<del>John</del>	<del>Rader</del>	Adam Telle	
Markey	MA	John	Walsh		
Warren	MA	Jon	Donenberg		
Coons	DE	Jonathan	Stahler		
Whitehouse	RI	Josh	Karetny (acting)		
Braun	IN	Joshua	Kelley		
Leahy	VT	JP	Dowd		
Murkowski	AK	Kaleb	Froehlich		
Duckworth	IL	Kalina	Thompson		
King	ME	Kathleen	Connery Dawe		
Baldwin	WI	Ken	Reddy		
Portman	OH	Kevin	Smith		
Hickenlooper	CO	Kiran	Mehra		
Casey	PA	Kristen	Gentile		
Lummis	WY	Kristin	Walker		

## Senate Chiefs of Staff

July 2021

Rounds	SD	Kyle	Chase		
Hawley	MO	Kyle	Plotkin		
Manchin	WV	Lance	West		
Sullivan	AK	Larry	Barton		
Klobuchar	MN	Lindsey	Kerr		
Ernst	IA	Lisa	Goeas		
Romney	UT	Liz	Johnson		
Inhofe	OK	Luke	Holland		
Hassan	NH	Marc	Goldberg		
Warnock	GA	Mark	Libell		
Cramer	ND	Mark	Gruman		
Stabenow	MI	Matt	Vankuiken		
Sinema	AZ	Meg	Joseph		
Merkley	OR	Michael	Zamore		
Lankford	OK	Michelle	Altman		
Wicker	MS	Michelle	Richardson		
Kaine	VA	Mike	Henry		
Schumer	NY	Mike	Lynch		
Rubio	FL	Mike	Needham		
Murray	WA	Mindi	Lingquist		
Sanders	VT	Misty	Rebik		
Burr	NC	Natasha	Hickman		
Reed	RI	Neil	Campbell		
Thune	SD	Nick	Rossi		
Durbin	IL	Patrick	Souders		
Sasse	NE	Ray	Sass		
Heinrich	NM	Rebecca	Avitia		
Ossoff	GA	Rey	Benitez		
Graham	SC	Richard	Perry		
Rounds	SD	Rob	Skjonsberg		
Thune	SD	Ryan	Nelson		
Risch	ID	Ryan	White		
Brown	OH	Sarah	Benzing		
Cortez Masto	NV	Scott	Fairchild		
Johnson	WI	Sean	Riley		
Blackburn	TN	Sean	Farrell		
McConnell	KY	Sharon	Soderstrom		
Blunt	MO	Stacy	McBride		
Tuberville	AL	Stephen	Boyd		
Collins	ME	Steve	Abbott		
Cruz	TX	Steve	Charlan		
Crapo	ID	Susan	Wheeler		
Tillis	NC	Ted	Lehman		
McConnell	KY	Terry	Carmack		
Boozman	AR	Toni Marie	Higgins		
Hoeven	ND	Tony	Eberhard		
Van Hollen	MD	Tricia	Russell		
Booker	NJ	Veronica	Duron		
Shelby	AL	Watson	Donald		
Paul	KY	William	Henderson		